


HHS COMMITTEE #1  
November 1, 2012

**MEMORANDUM**

October 31, 2012

TO: Health and Human Services Committee

FROM: Linda McMillan, Senior Legislative Analyst 

SUBJECT: **Discussion with Commission on Aging on Senior Agenda**

Ms. Judy Welles, Chair of the Commission on Aging, and other representatives from the Commission on Aging will be present at this session to discuss the Commission's Senior Agenda. A copy of the Senior Agenda as printed in the Commission's FY11 Annual Report is attached at © 1-2.

The purpose for this discussion is two-fold. First, is for the HHS Committee to have an opportunity to better understand the recommendations in the Senior Agenda, the background on how the Commission reached its recommendations, and the Commission's priorities for moving forward with the recommendations. The second is for the HHS Committee to discuss whether it wants to recommend to the Council that the Council pass a resolution in support of the Senior Agenda as recommended by the County Executive. The memo from the County Executive is attached at © 3 and his proposed resolution is attached at © 4.

Ms. Welles will provide the HHS Committee with an overview presentation of the Senior Agenda. Her remarks to the Committee are attached at © 5-7 and a copy of her powerpoint presentation is attached at © 8-18. Background on the "Call to Action" and the Senior Agenda are attached at © 19-25. A summary table (from Council staff) on the new funds included in the FY13 Operating Budget in support of the Senior Initiative is attached at © 26. Lastly, attached to this packet is an excerpt from the Commission's FY11 Annual Report on the Commission's summer study efforts on housing and mental health.

### Council staff comments

The Council has in other forums focused on the needs of the growing senior population in Montgomery County. Whether as a part of updates on the results of the recent census, last spring's *Shaping our Future* session on the growing senior population, or in capital and operating budget sessions. The Commission's Senior Agenda is a comprehensive set of recommendations that address most aspects, if not all, aspects of life and adjustments that may need to be made as one ages. As written, it not only provides a **vision** for Montgomery County but also specific policy statements regarding what the county **will** do. The preamble to the Senior Agenda calls for the county to commit to planning over five years for the significant growth in the senior population. The County Executive's memo says that he fully endorses, "the vision articulated in the Commission's "Senior Agenda" and the key elements identified as essential to optimal aging in place/community." The resolution he has proposed says that he, "enthusiastically endorses both the overarching intent of the Commission's Senior Agenda and its key elements..." He proposes that the Council, "fully endorses the Senior Agenda and supports efforts to fund and pursue activities and programs..." Council staff is concerned with the expectations from this proposed action statement given the potential cost of some of the recommendations and the likelihood that over the next few years growth in the County Government operating budget is likely to be very small, if it is able to grow at all. (The Council's adopted fiscal plan projects that County Government will have to reduce its budget in FY14).

Many items in the Senior Agenda can be addressed by County Government if funding is available. Some of these include:

- Transportation planning.
- Making housing options and alternatives a part of County planning efforts.
- Public-private partnerships as an option to provide housing suitable for older adults.
- Providing recreation programs for older adults throughout the county, particularly where there are no senior centers.
- Making libraries locations for activities and resources for older adults.
- Expanding police and fire safety programs targeted to older adults.

However, some of the items, particularly in health and wellness, may be beyond the scope of what County Government could include in a plan that would be county funded and implemented.

- Medical care for older adults will be available, accessible, and affordable.
- Direct services and education programs to plan for serious illness and to manage chronic diseases including promotion of self-management programs will be a priority.
- Access to hearing and dental care will be available.
- Specialized mental health care will be available as an integral part of the health services delivery system.

The Committee may want to discuss how best to prioritize and implement a policy document like the Senior Agenda if it is adopted or endorsed by the Council. A summary of the

new FY13 funding is attached at © 26. With the exception of additional funding added to the Community Engagement Cluster for counseling, all the items included were a part of the County Executive's recommended budget. Should a plan for recommended annual funding for a Senior Agenda come to the Council and the Executive at the same time? What group or commission might be asked to make this annual recommendation? If the Senior Agenda/Senior Initiative is to build year by year, who or what group should be responsible for monitoring and reporting on its progress and whether monies are being spent on programs or services that prove effective?

Council staff asked that the Commission share with the HHS Committee its current thinking regarding priorities for FY14. Comments are provided on © 7. In summary, they include:

- Restoring funding to the Housing Initiative Fund to enable more affordable housing for seniors.
- Establishing a Coordinator to provide technical and planning assistance for the development of "villages" especially for lower income residents.
- A plan to connect transportation to community centers for activities for mental and physical health.
- Funding for recreation and senior center maintenance and staffing.
- Increased funding for case management for frail seniors.
- Increase funding for mental health services for seniors (Senior Outreach Services) and respite care for caregivers.
- Provide printed information to seniors in multiple languages.

## **Next Steps**

The County Executive has asked the Council to adopt his proposed resolution (© 4). The Committee may wish to (1) continue its discussion with the Commission on Aging before making any recommendation to the Council regarding the proposed resolution, (2) recommend a different resolution that might have the Council endorsing the "vision" of the Senior Agenda rather than making any statement about funding and making any specific recommendations the Committee may have regarding priority setting, evaluation, and oversight, or (3) recommend the Council approve the resolution proposed by the County Executive.



## SENIOR AGENDA

### A Community for a Lifetime : A Proposal for a Senior Agenda Submitted by the Montgomery County Commission on Aging

In August 2010, the Montgomery County Commission on Aging (COA) issued a **Call to Action** in which the COA asked that the County adopt a **Senior Agenda** to plan over the next five years for the significant increase in County residents over age 65. The following **Senior Agenda** represents the Commission's perspective on how the County can become a place for older adults to live safe, health and vital lives.

### Montgomery County will be a Community for a Lifetime— a place for older adults to live safe, healthy and vital lives.

#### Commitment to Older Adults

- The County will have a policy against ageism, including age stereotyping.
- Older adults are a valuable economic, cultural, and social resource and will be included in all County planning activities at the Executive and Council levels.
- Planning related to older adults will include consideration of diversity, inclusiveness, and intergenerational elements.
- Demographic data about older adults will be maintained, analyzed, and incorporated into planning.
- Resource information relevant to older adults will be distributed and accessible.
- The County will have a plan to address options for aging in place and alternatives.
- The County will promote public-private partnerships that contribute to implementation of this Agenda.

#### Transportation

**Vision:** *Montgomery County will have public and private transportation and mobility systems that enable older adults to go where they want to go, when they want to go and how they want to get there.*

- Affordable senior transportation will be a priority.
- Planning will include in-neighborhood options to make transportation accessible and to make affordable escorted transportation available.
- Planning will encompass the needs and safety of both pedestrians and those who do not drive.
- Transportation planning will include a focus on the needs of older adults as they become less able to drive.

#### Housing

**Vision:** *Montgomery County will promote choices of dwelling types so that as the needs and preferences of older adults change, they can age in place, downsize, choose rental or ownership, or find housing with the appropriate level of supportive services without having to leave the community.*

- Affordable senior housing will be promoted and made available.
- Housing options and alternatives will be part of County planning efforts.
- Visitable and livable options will be included in County planning.
- New and existing construction and redevelopment will consider the needs of both current and prospective older residents.
- The County will assist and encourage efforts to create supportive communities such as villages, co-housing and other options.
- Redevelopment planning will encourage walkable communities.
- Planning efforts will include public-private partnerships as an option to providing housing suitable for older adults.



## Socialization and Leisure

**Vision:** *Montgomery County will encourage and support vital living of older adults by providing opportunities for physical, mental and social interaction.*

- Recreation programs will facilitate socialization and other activities that integrate health and wellness.
- Recreation programs will be available and easily accessible to older adults throughout the County, particularly in areas where there are no senior centers.
- Lifelong learning opportunities will be available.
- Libraries will be a location of activities and resources for older adults.
- Active efforts will be made to engage older adults as volunteers.

## Health and Wellness

**Vision:** *Montgomery County will expand public health and prevention programs that promote physical, mental, social and environmental health for older adults.*

- Medical care for older adults will be available, accessible, and affordable.
- Healthcare providers will be encouraged to accept private and public health insurance including Medicare and Medicaid.
- Direct services and educational programs to plan for serious illness and to manage chronic diseases including promotion of self-management programs will be a priority.
- Access to hearing and dental care will be available.
- Nutrition support including education and meals will be provided.
- Specialized mental health care will be available as an integral part of the health services delivery system.
- Caregiver support will be a priority.
- Services to address cognitive impairment will be available, accessible and affordable for affected older adults and their families and caregivers.

## Communications

**Vision:** *Montgomery County will distribute and publicize recognizable, understandable, timely, and accessible information on County and public resources and services for older adults.*

- Information will be understandable and accessible by older adults and their caregivers in diverse ethnic population groups
- Information will clearly state who is eligible for services at no cost and who is eligible at specified costs.
- Information for older adults will be branded uniformly for consistency and recognizable identification
- The County will use and publicize multiple media to disseminate information relevant to older adults, including social media, its regularly updated website and a 24/7 information resource line.

## Employment

**Vision:** *Montgomery County will recognize the extent and value of the contribution of older adults to the economy.*

- The County will encourage County agencies and private companies to offer employment opportunities as older adults transition to retirement.
- The County will encourage job fairs, partnerships, and forums to help older adults prepare themselves to continue in or reenter the workforce and find jobs.
- The County will provide information that promotes the value of older workers.

## Security and Safety

**Vision:** *Montgomery County will provide physical, financial, and technological protection and safety for older adults.*

- The County will expand its police and fire safety programs targeted toward older adults.
- The County will educate both older adults and their caregivers about the potential for financial crimes, including telephone and computer scams.
- The County's Ombudsman Program will increase its monitoring of the safety of group homes and assisted living facilities.
- The County will work to assure legal protection from financial exploitation of older adults. ■




OFFICE OF THE COUNTY EXECUTIVE  
ROCKVILLE, MARYLAND 20850

Isiah Leggett  
County Executive

MEMORANDUM

May 1, 2012

TO: Roger Berliner, Council President

FROM: Isiah Leggett, County Executive 

SUBJECT: Council Resolution in Support of a Senior Agenda

I am very pleased to submit for your consideration a proposed Council resolution in support of the "Senior Agenda" developed by the Montgomery County Commission on Aging. This "Senior Agenda" builds upon the collaborative efforts of the Executive Departments and the Council to address the current and emerging needs of today's and tomorrow's seniors. It also promotes planning processes and resource development to ensure that seniors remain active, engaged and contributing members of our community.

The Montgomery County Commission on Aging has shared this agenda with me and it strategically builds upon the Senior Summit and Senior Subcabinet work that the Executive Branch has engaged in for the past few years. The Commission has also shared the agenda with the Council and I believe builds upon the commitment and the work that Council has done to support senior policy in the County. The Commission is continuing to work toward making our County a place where all residents can live their entire lives. By the year 2020, the senior population of Montgomery County is projected to reach over 220,000—a 69% increase since 2000. This significant demographic shift calls for a collective affirmation of a new vision for all our residents who want to age with safety, dignity, and vitality.

I fully endorse the vision articulated in the Commission's "Senior Agenda" and the key elements identified as essential to optimal aging in place/community. I look forward to the County Council's adoption of the Senior Agenda during May, a month that is set aside to celebrate Older Americans.

IL:gh

Attachments

Resolution No. \_\_\_\_\_

Introduced: \_\_\_\_\_

Adopted: \_\_\_\_\_

**COUNTY COUNCIL  
FOR MONTGOMERY COUNTY, MARYLAND**

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By: Council President at Request of County Executive

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**SUBJECT:**    Council's Support for County Executive's Senior Agenda

**Background**

1.    In May 2008, the County Executive established a Senior Subcabinet, comprised of department directors from the Department of Health and Human Services, Department of Public Libraries, Department of Recreation, Office of Community Partnerships, Office of Human Resources, Office of Management and Budget, Fire and Rescue Services, Regional Service Centers, Department of Technology Services, Office of Consumer Protection, Department of Economic Development, Department of Transportation, Office of Public Information, Department of Police, Department of Housing and Community Affairs, Department of Permitting Services, Commission for Women, Regional Service Centers and senior executive staff to coordinate County government planning activities and programs serving older adults in our community.
2.    In November 2008, the County Executive convened a Senior Summit to obtain recommendations from residents on how to make Montgomery County a place for older adults to live safe, healthy, and vital lives
3.    The Senior Summit identified key issues affecting older adults in the areas of transportation, housing, health, home and community based services, socialization, communications, employment, and safety. On many of these issues, the County has responded with excellent services and programming for older residents. However, more needs to be done to create a more cohesive plan for senior residents.
4.    Building on the work of the Senior Subcabinet and the Senior Summit the Montgomery County Commission on Aging has proposed a comprehensive Senior Agenda which provides the framework and vision which will inform County policy on issues affecting senior residents.
5.    The County Executive enthusiastically endorses both the overarching intent of the Commission's Senior Agenda and its key elements which align closely with the areas identified by his 2008 Senior Summit and the focus of his Senior Subcabinet on Vital Aging.

**Action**

The County Council for Montgomery County, Maryland approves the following resolution:

The County Council fully endorses the Senior Agenda and supports the efforts to fund and pursue activities and programs that will help make Montgomery County "A Community for a Lifetime: A Place for Older Adults to Live Safe, Healthy and Vital Lives."

Testimony before the HHS Committee  
Montgomery County Council  
A Community for a Lifetime: A Senior Agenda  
November 1, 2012

I am Judith Welles, Chair of the Commission on Aging, and I want to begin by thanking you and the County Council for the current year budget that restored funding in several areas important to older adults. After years of program reductions, we need to build on that downpayment and begin implementing the Senior Agenda this Commission has outlined for a Community for a Lifetime.

The County's demographic shift to older adults is dramatic and diverse. It is estimated that one out of four residents will be 60 years of age or older by 2020.

Just as we plan for and build highways and the basic infrastructure of communities, we need to plan for and build the infrastructure to make Montgomery County a community for a lifetime.

When we look back at what our County did at the start of the Baby Boom generation, it should provide inspiration as to how Montgomery County can again rise to this demographic challenge. Throughout the 1950s and 60s, our county built the infrastructure to meet the needs of educating, transporting, and caring for the health of a new generation, Baby Boomers. We built housing, schools, parks, put new buses and new routes into service – every aspect of a livable community.

Just as we planned for and built an infrastructure for the beginning of the Baby Boom generation, we again need to plan and build to meet the new and different needs of our vibrant older population. "A Community for a Lifetime: A Senior Agenda" that we discuss today is that blueprint.

The Commission on Aging, in its advisory role to County government, saw the need for a long-term plan for successful aging in our County. The Commission developed and recommended a comprehensive Senior Agenda to set forth a vision and goals for a community for a lifetime.

The process toward a Senior Agenda began years ago, and I would like to relate the chronology, most of which is included in the background material we submitted to you prior to this meeting. The County recognized years ago that we needed to prepare for the burgeoning senior population. There were County-funded studies, the Towson Report and the Reingold Report in 2007, and a Senior Summit convened by the County Executive in 2008. The Commission continued its Summer Studies, beginning with a report on Aging in Place and, in subsequent years, studies on transportation, mental health, housing and state legislation for a Community for A Lifetime.

In 2010, following a Commission retreat, we issued a Call to Action, requesting a comprehensive vision and agenda for seniors that considers the geographic, economic and culture diversity of successful aging. We also called for development of a comprehensive Senior Transportation and Mobility Plan and a seat on the Senior Subcabinet. The County Executive responded positively.



In 2011, as a result of the Commission's advocacy efforts, the Maryland Legislature passed and the Governor signed legislation that encourages Counties to develop Communities for a Lifetime. At its annual meeting in May of that year, the Commission held a brainstorming session on the elements that would enable Montgomery County to become a Community for a Lifetime. The Commission appointed a special Task Force to begin drafting formal language for a Senior Agenda with input from all of our committees and study leaders.

In September, 2011, a draft senior Agenda was presented to the Commission, and the final version - which you have before you - was approved by the Commission in October, exactly one year ago. Meetings with the co-chairs of the senior SubCabinet and the County Executive followed and Mr. Leggett announced the Senior Agenda last spring, in May, 2012, at an event with Mr. Leventhal.

The overarching vision of the Senior Agenda is that Montgomery County **be a community for a lifetime, a place for older adults to live safe, healthy and vital lives.** The **Agenda** addresses the concerns of all who want to age in place in their homes or in their community in Montgomery County. Within that there are seven areas, each of which contains a vision statement, embracing the needs of older adults for

- transportation when they need it;
- affordable housing and choices of dwellings;
- public health programs that promote physical and mental health;
- recreational opportunities for physical and mental fitness and social interaction for vital health;
- understandable and accessible information on County programs;
- promoting the value of older workers;
- safety with both physical and financial protections.

The Commission applauds the County Executive for endorsing the Senior Agenda and demonstrating commitment to the needs of our senior population. As residents of the County, and as an advisory body, we are proud that he not only endorsed a Senior Agenda but also called for actions to carry out the vision and sent a Resolution to you to adopt.

By approving a Resolution on the Senior Agenda, the County Council would establish a policy around older adults that would be a guidepost now and for the future. Such a policy would encourage County departments to take actions each year.

The Commission will continue to work with the County and the County Council in advising on actions planned for programs and services. While we will be watching, we ask that the Council also provide oversight because the needs of our older population, which differ from others and are not always evident, are often overlooked.

There are critical housing, transportation, and mental health priorities for older adults who are needy and at-risk and, also, for those of low and middle-income whose continued independence relies on some services. To take action this year toward the Senior Agenda, the Commission has identified these priorities:

**Aging in Place: Housing and Services:** We recommend that the County **restore funding to the Housing Initiative Fund and, thereby, enable more affordable housing for seniors.**

We also know that residents want to age in place and this has led to “Villages” where neighbors help one another. If we can develop communities where people can age with supportive services to meet their needs, we can reduce the costs of institutionalization and health care. We recommend the County **establish a Coordinator to provide technical and planning assistance**, especially for the development of villages for lower income residents.

**Transportation:** Transportation is the uppermost concern of older residents, especially those aging in place. The Commission urges a transportation plan for seniors that coordinates all public and private options including escorted transportation and a ride share service.

To build the infrastructure for aging, the FY 14 budget should **connect transportation to community centers** for activities for mental and physical health. This needs to be an integral part of a transportation plan.

**Health -** More than 25 percent of County seniors age 65 and older, the majority of whom are women, live alone. Services that promote social connection and fitness are key to mental health. Recreation and senior centers provide these services but to do so, we need to **fund senior center maintenance and staffing.**

An estimated 18 percent of seniors have a limitation in daily living. With increased cases of the most frail and vulnerable, we need to adequately provide case management and increase **funding for case management.** County mental health services for vulnerable and needy seniors include **Senior Outreach Services** that has been flat for years despite unprecedented growth of our older population and **respite care** for caregivers which has received harsh funding cuts.

Finally, the need for information is the most frequent comment we hear from older residents in the outreach that we do. We need to restore funds to print publications, in multiple languages, because those over the age of 75 rely on and need **printed information.**

Thank you for continuing to make Montgomery County a model of a caring and modern County striving to serve the needs of all of its residents. We urge the County Council to embrace the steps to make our County a Community for a Lifetime and approve a Resolution on the Senior Agenda.

# **A Community for a Lifetime**

## **A Senior Agenda**

### **Montgomery County Commission on Aging**

**2012**

***Montgomery County will be a Community for a Lifetime –  
a place for older adults to live safe, healthy and vital lives***

# Commitment to Older Adults

- Montgomery County will have a policy against ageism including age stereotyping.
- Older adults are a valuable economic, cultural and social resource and will be included in all County planning activities at the Executive and Council levels.
- Planning related to older adults will include consideration of diversity, inclusiveness and intergenerational elements.
- Demographic data about older adults will be maintained, analyzed and incorporated into planning.
- Resource information relevant to older adults will be distributed and accessible.
- The County will have a plan to address options for aging in place and alternatives.
- The County will promote public-private partnerships that contribute to implementation of this Agenda.

# Transportation

**Vision:** *Montgomery County will have public and private transportation and mobility systems that enable older adults to go where they want to go, when they want to go and how they want to get there*

- Affordable senior transportation will be a priority.
- Planning will include in-neighborhood options to make transportation accessible and to make affordable escorted transportation available.
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- Transportation planning will include a focus on the needs of older adults as they become less able to drive.

# Housing

**Vision:** *Montgomery County will promote choices of dwelling types so that as the needs and preferences of older adults change, they can age in place, downsize, choose rental or ownership or find housing with the appropriate level of supportive services without having to leave the community.*

- Affordable senior housing will be promoted and made available.
- Housing options and alternatives will be part of County planning efforts.
- Visitable and livable options will be included in County planning.
- New and existing construction and redevelopment will consider the needs of both current and prospective older residents.
- The County will assist and encourage efforts to create supportive communities such as villages, co-housing and other options.
- Redevelopment planning will encourage walkable communities.
- Planning efforts will include public-private partnerships as an option to providing housing suitable for older adults.

# Socialization and Leisure

**Vision:** *Montgomery County will encourage and support vital living of older adults by providing opportunities for physical, mental and social interaction.*

- Recreation programs will facilitate socialization and other activities that integrate health and wellness.
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- Lifelong learning opportunities will be available.
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- Active efforts will be made to engage older adults as volunteers.



# Health and Wellness

**Vision:** *Montgomery County will expand public health and prevention programs that promote physical, mental, social and environmental health for older adults.*

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- Access to hearing and dental care will be available.

# Health and Wellness

(cont.)

**Vision:** *Montgomery County will expand public health and prevention programs that promote physical, mental, social and environmental health for older adults.*

- Nutrition support including education and meals will be provided.
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- Caregiver support will be a priority.
- Services to address cognitive impairment will be available, accessible and affordable for affected older adults and their families and caregivers.

# Communications

**Vision:** *Montgomery County will distribute and publicize recognizable, understandable, timely and accessible information on County and public resources and services for older adults.*

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# Employment

**Vision:** *Montgomery County will recognize the extent and value of the contribution of older adults to the economy.*

- The County will encourage County agencies and private companies to offer employment opportunities as older adults transition to retirement.
- The County will encourage job fairs, partnerships, and forums to help older adults prepare themselves to continue in or reenter the workforce and find jobs.
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# Security and Safety

**Vision:** *Montgomery County will provide physical, financial and technological protection and safety for older adults.*

- The County will expand its police and fire safety programs targeted toward older adults.
- The County will educate both older adults and their caregivers about the potential for financial crimes, including telephone and computer scams.
- The County's Ombudsman Program will increase its monitoring of the safety of group homes and assisted living facilities.
- The County will work to assure legal protection from financial exploitation of older adults.

## Background of Senior Agenda

### Summer 2010 – COA Retreat

- “Call to Action” developed, which included language requesting support for building a Senior Agenda. (See Attached Call to Action)  
“Build a comprehensive vision and agenda for seniors that consider the geographic, economic and cultural diversity that exists in the County. Included in this agenda will be policies around housing, transportation, recreation, health, nutrition and other areas that are essential components of successful aging. We need a vision and agenda with innovative approaches that will help establish Montgomery County as a Community for a Life Time.”

### September 2010 – Letter from Mr. Leggett

- County Executive concurrence with the “Call to Action” and specifying areas of high priority to seniors. (See Attached)

### February 2011 – Formal meeting with Mr. Leggett

- County Executive agreed to put the chair of the COA on the Senior SubCabinet as an ex officio member and stated that he would direct his staff to develop a Transportation Plan and a Senior Agenda.

### May 2011 – COA Annual Meeting

- Background presented regarding historical development leading to a Senior Agenda (Attached)
- Brainstorming session (See attached summary)

### Summer 2011 –

- COA Task Force met to begin drafting more formal language for the Senior Agenda.
- Committees of the COA were asked for input on sections relevant to their concerns.

### September 2011 – COA meeting

- Draft Senior Agenda presented to the Commission (See attached)

### October 2011 – COA Meeting

- COA gave final approval on Senior Agenda



COMMISSION ON AGING

A CALL TO ACTION

August 2010

To: Montgomery County Executive, County Council Members, and  
All Candidates for Election in Montgomery County as County  
Executive and County Council Members

From: Elaine Kotell Binder, Chair  
The Montgomery County Commission On Aging

Subject: A Call to Action on Behalf of Seniors

The Commission calls on the County Executive, County Council and all candidates for the office of County Executive and County Council to commit publicly to ensuring that all older adults can age successfully in Montgomery County and that you will work with the Commission to ensure that seniors' needs are addressed in both policy and programs.

We ask that you respond to this call in writing and that you work with us as we continue to identify both policy and programmatic priorities that concern seniors.

The Montgomery County Commission on Aging serves as an advocate for the health, safety and well being of the County's senior residents. The Commission supports both safety net services for frail older adults and programs to meet the interests and needs of those who are healthy and active.

With a current population of more than 110,000 individuals over the age of 65 and a projected growth that increases the percentage of seniors in the population, it is imperative that the County fulfill its commitment to follow up on the recommendations that emerged from the Senior Summit convened by County Executive Leggett in November 2008.

We believe the time has come for the County to focus its attention on our growing population of both vulnerable and vital seniors by addressing their transportation,

housing, recreation, nutrition and other needs. Twenty-five percent of County seniors age 65 and older live alone. An estimated 18% of seniors have a limitation in performing activities of daily living. Older persons who live alone are more likely than those living with spouses to be in poverty. We must also focus attention on middle-income seniors who rely on transportation and socialization services to maintain their vitality. Finally, it is critical that we take into consideration the needs of diverse groups in our community and work collaboratively with them.

We recognize that there are considerable financial constraints on the development of new programs and services. However, we believe that this is the perfect time to begin planning for the future – to consider creative and innovative approaches to serving the burgeoning population of older adults. It is in the County's economic interest to retain our current senior population and to attract others to age here. The County currently has a significant number of individuals who have accumulated wealth and whose contributions to the tax base will be substantial if they remain in the County as they continue to age. In addition, many of these seniors make significant contributions to the County through their volunteer efforts. Finally, we believe that there is considerable cost savings to providing services that enable seniors to live safely in more independent conditions rather than in institutions.

Therefore, we ask for a commitment to:

Build a comprehensive vision and agenda for seniors that consider the geographic, economic and cultural diversity that exists in the County. Included in this agenda will be policies around housing, transportation, recreation, health, nutrition and other areas that are essential components of successful aging. We need a vision and agenda with innovative approaches that will help establish Montgomery County as a Community for a Life Time.

Develop a specific, long-term, comprehensive Senior Transportation and Mobility Plan. Transportation is the single most frequently mentioned concern of seniors. The Commission seeks to work with the County in beginning to develop a transportation and mobility plan that incorporates both public and private services. Despite current financial limitations, it is time to develop a plan that: considers existing services and current County research; examines best practices from across the country, and plans for the use of technological advances in order to create an overall approach to providing transportation that meets the needs of our older population.

Continue the commitment made by the County Executive for the Senior



Sub-cabinet, which was created to implement the goals of the Senior Summit held in November 2008. Expand membership on the Senior Sub-cabinet by appointing an officer of the Commission on Aging as a full participant on the Sub-cabinet. Include on the Senior Sub-cabinet representation from the Vital Living Committee, and a liaison from the County Executive's Office. Ensure full participation by the decision-makers in all departments that affect seniors.

Please respond to: Elaine Kotell Binder, Chair  
Montgomery County Commission on Aging  
c/o Department of Health and Human Services  
Aging and Disability Services  
401 Hungerford Drive 4th Floor  
Rockville, MD 20850



OFFICE OF THE COUNTY EXECUTIVE  
ROCKVILLE, MARYLAND 20850

Isiah Leggett  
County Executive

September 7, 2010

Ms. Elaine Kotell Binder, Chair  
Montgomery County Commission on Aging  
Department of Health and Human Services  
Aging and Disability Services  
401 Hungerford Drive, 4<sup>th</sup> Floor  
Rockville, Maryland 20850

Dear Ms. Binder:

Thank you for the Call to Action recently received from the Commission on Aging. I am pleased that the Commission on Aging continues to advocate strongly for all seniors in our County and to support the expansion of the work of the Senior Subcabinet.

From my very first day as County Executive, I have made it clear that my vision and priorities include Vital Living for all our residents and particularly seniors. In May 2008, I convened a full day working Retreat on Senior Vital Living involving all department Directors. At this session, I established the Senior Subcabinet to coordinate the work of all county Departments in promoting senior vital living.

My first charge to the Senior Subcabinet was to organize a Senior Summit in November 2008, to which businesses, nonprofit agencies, members of our faith communities, advocates and other senior stakeholders were invited. As you are aware, the Senior Summit was attended by over 300 public and private senior stakeholders. The subsequent accomplishments of the eight workgroups, created as a result of the Senior Summit, were recognized during the one-year anniversary event in November 2009. Accountability for these efforts is included in the CountyStat process in order to measure progress and monitor outcomes. The work of the Senior Subcabinet and the eight workgroups have been impacted by the financial crisis faced by the County, however, we have continued to produce many accomplishments. I have attached a list of select accomplishments that demonstrate my commitment to promoting senior vital living and to serving our most vulnerable seniors.

Moving forward, I commit to developing a comprehensive vision and agenda for seniors that considers the geographic, economic and cultural diversity that exists in the County. Our aim is to position Montgomery County as a "Community for a Life Time." To that end, I will ensure that policies and practices in the key areas affecting senior quality of life are responsive to the unique needs and preferences of Montgomery County seniors. As determined by current best practices and affirmed by the 2008 Senior Summit, these areas include housing, transportation, health and wellness, information access, safety, employment, home-based services, and civic engagement.

# Montgomery County – A Senior Agenda

## Background

### 2007 – Strategic Planning

- Towson Report “Imaging an Aging Future for Montgomery County
- Reingold Report

### 2008 – COA Transportation Summer Study Senior Summit

- White papers based on Blueprint for Action: Developing Livable Community for All Ages
- 8 topic areas: Health and Wellness, Housing and Zoning; Home and Community Supports; Civic and Social Engagement; Transportation: Safety: Employment: Communication and Outreach
- Development of Action Steps

### 2009 – COA Aging in Place Summer Study Senior Subcabinet and 8 workgroups

- Progress Report

### 2010 – COA Communities for a Lifetime Summer Study COA Call to Action

- Build a comprehensive vision and agenda for seniors that considers the geographic, economic and cultural diversity existing in County
  - Policies around housing, transportation, recreation, health, nutrition, other areas that are components of successful aging
  - Development of a long-term, comprehensive Senior Transportation and Mobility Plan
  - Seat on the Senior Subcabinet

### 2011 - Results of COA Call for Action

- Mr. Leggett responded positively, identified the 2009 results of the Senior Summit and directed the following:
  - Senior Subcabinet asked to develop the Agenda
  - Department of Transportation developed Aging Policy for the Department
  - COA invited to develop county-wide senior transportation plan
  - COA became an ex officio, non-voting member of the Senior Subcabinet

### Maryland Legislature passed Communities for a Lifetime legislation

- Seek to expand affordable transportation options for older adults;
- Seek to expand affordable housing options for older adults, both as homeowners and as renters;
- Seek to expand public health and prevention programs that promote physical, mental, social and environmental health for older adults;
- Seek to expand employment and civic engagement options for older adults; and

- Seek innovative ways to expand needed services to support aging in the community within planned budgets.

<b>Senior Initiative</b>	
<b>Health and Human Services:</b>	<b>Funding</b>
Six Month Pilot to expand "Smooth Ride Program" escorted transportation program. Funds 550 one-way trips	\$ 55,000
Expand home delivered meal program to 16 chronically ill, frail clients aged 60 or older with focus on low-income, minorities, limited English, or risk of institutionalization (note: total funding for home delivered meals is about \$680,000 and for the senior nutrition program about \$1.7 million)	\$ 35,000
Enhance Senior Outreach Team mental health services with addition of part-time therapist to serve 85 home-bound seniors and coordinate medications	\$ 50,000
Restore Home Care Chore Services to 21 frail, low-income elderly who need help with light housekeeping	\$ 50,000
Increase Heavy Chore Services to 25 senior clients with hoarding behaviors. Services include heavy cleaning and pest control	\$ 20,000
Increase the State Senior Care Gateway Grant that provides personal care, chore services, transportation, respite care, meals, and transportation to low-income seniors aged 65 and older that may be at risk of nursing home placement	\$ 359,754
<b>Department of Recreation:</b>	
Enhance senior programming at White Oak Community Recreation Center (open Spring 2012) including exercise, art, health, and on-site nutrition program	\$ 117,120
<b>Transit Services (DOT):</b>	
Decrease cost of 2nd Call N Ride coupon book by about \$5 (depending on income) to FY11 rates. (REVENUE DECREASE)	\$ 160,670
<b>Housing and Community Affairs:</b>	
Invest \$1.5 million from the Housing Initiative Fund with previously appropriated funds to build a senior independent living facility next to the new Silver Spring Library. Up to 140 units of which 98 will be affordable to seniors with incomes between 30	\$ 1,500,000
<b>Office of Human Resources:</b>	
Double the Senior Fellows program to augment the county's workforce by tapping skills of seniors	\$ 50,000
<b>State's Attorney's Office:</b>	
Restore funds for one Assistant State's Attorney for Special Prosecutions to protect seniors from financial harm and fraud	\$ 80,000
<b>Community Engagement Cluster:</b>	
Restore limited funding for counseling services via contract. (Item total for Commission for Women is \$140,000 with \$42,000 targeted to people 55 and older.)	\$ 42,000
Replace lost Federal funds and maintain Retired Senior Volunteer Program at FY12 levels.	\$ 23,550
<b>Community Grants:</b>	
More than \$600,000 in FY13 Community Grants to non-profits for services to seniors	\$ 600,000

## FY11 Summer Studies Work Groups

At the COA's Annual Meeting in May, Commissioners decided to undertake a study of housing policy in the County as it affects our seniors. The goals of this Summer Study were to:

- Study the Special Exception Zoning process for approval of Accessory apartments for determining the validity of an expedited approval process for this housing option; and
- Study the voluntary Montgomery County Visit-Able and Live-Able program to determine whether or not the programs should be strengthened or become mandatory.



COA at work: Joseph Petrizzo, Barbara Mulitz, Mona Ngem and Shawn Brennan

Commission for People with Disabilities and the Maryland National Capital Home Builders Association presented their organizations' viewpoints on these topics. During the last Housing Summer Study session, participants reviewed information gathered in the two previous sessions and developed a set of recommendations for

Commission consideration. The following Housing Summer Study recommendations were approved unanimously by the full Commission at its September meeting:

Commission member Leslie Marks chaired this study. Thirteen Commission members participated, along with representatives from the County's Department of Housing and Community Affairs, the Maryland National Capital Park and Planning Commission (MNPPC), the Commission on People with Disabilities, the Maryland National Capital Builders Industry Association, Easter Seals, and representatives from the offices of Montgomery Council members Nancy Floreen and Marc Erlich.

During three summer meetings, participants learned definitions for the terms *Design for Life*, *Visit-Able*, and *Live-Able* as they relate to housing and became educated about the zoning process and procedures. At the first meeting, Jennifer Wise from the Montgomery County Planning Board educated participants about the zoning rewrite process and explained the benefits and drawbacks of allowing development of accessory apartments without going through the Special Exception process, which can be complex, lengthy, and expensive. A representative from the County's Department of Housing and Community Affairs also offered expertise about the approval process at that meeting.

During the second meeting, participants studied the Design for Life program, the voluntary Visit-Able and Live-Able housing program to make housing accessible to all. Representatives from the

- Approve housing issues for seniors in Montgomery County as a priority for the coming year;
- Support an expedited process to make approval of accessory apartments less costly and less time consuming; and
- Continue to support the voluntary Design for Life program for Visit-Able and Live-Able apartments. Encourage broad-based education and public relations initiatives to enhance a more robust program.

**Housing Task Force.** Following the Housing Summer Study and Commission approval of its recommendations, COA Chair Elaine Binder appointed a small COA Task Force to:

- Provide COA input to the upcoming rewrite of the County's Housing Policy being written by the Department of Housing and Community Affairs at the request of the County Executive and for approval by the County Council.
- Support Commission participation, to the extent appropriate, on issues relating to the upcoming changes in the zoning laws being recommended by the MNCPPC; and
- Make recommendations about the appropriate role of the COA in housing policy and program changes under consideration.



During the fall, this Task Force met with appropriate representatives from MNCPPC and the County's Department of Housing to review proposed revisions to both housing and zoning policy to provide them with information from the COA's Senior Agenda and the COA's position on issues related to housing for older adults. The Task Force also met with the President of Victory Housing, a nonprofit developer of affordable senior housing, to learn the organization's view of the development process for affordable senior housing. The Task Force developed COA testimony for a public hearing on revisions to the Montgomery County Housing Policy. It concluded with a report and a series of recommendations for further Commission consideration that promote the COA's continuing interest, involvement, and advocacy for housing programs for seniors in our County.

## Mental Health Summer Study

The Commission on Aging (COA) met over the summer to study mental and behavioral health services for older adults who reside in Montgomery County. Joining the COA were representatives from the Commission on Health, The National Alliance for the Mentally Ill, The Montgomery County Mental Health Association and Montgomery County government and non-government groups

In addition to learning about some of the existing programs and resources for seniors, workgroup members reviewed barriers and challenges to providing mental health care for older adults, discussed practices and strategies to improve care, and developed recommendations.

The purpose of this study was to learn more about Montgomery County's specialized mental health services for older adults. Two distinct areas of concern emerged:

- 1) people with *acute* psychiatric mental illness; and
- 2) people with *situational* mental health issues.

At the conclusion of the study, group members made recommendations focusing on education, funding, and legal considerations. Specific recommendations to the full Commission included the following:

- Endorse mental health as a priority and approve continuation of this important work in the Health and Wellness Committee;
- Advocate for development of programs for older

adults that promote wellness and prevention including nutrition, exercise, and feelings of "usefulness."

- Advocate for funding for senior mental health and support programs and services that promote social connectedness, leisure time activities, volunteerism, and intergenerational activities;
- Approve collaboration with State licensing bodies to provide information (via mail or email) to County providers related to mental health and older adults; and
- Approve collaboration with the Public Policy Committee to address the legal recommendations of the workgroup.

At the full September COA meeting, a motion was made and unanimously accepted to make Mental Health a COA priority for the coming year. The Health and Wellness Committee will add mental health to its agenda and follow up on the recommendations from Summer Study. ■

## Senior Nutrition Hotline

240-777-1100

Speak directly to a registered dietitian for reliable nutrition and diet information

Wednesday morning 9-11 am

Serving Montgomery County, Maryland



## Visit the Senior Services Site at

[www.montgomerycountymd.gov/senior](http://www.montgomerycountymd.gov/senior)



**Montgomery Senior Site**

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- Consumer Issues
- Employment
- Health
- Recreation & Libraries
- Safety
- Senior Housing
- Taxes & Finance
- Transportation